



# Delivering for consumers:

The parcel experience after EU Exit in 2023



August 2023  
[consumerCouncil.org.uk](https://www.consumerCouncil.org.uk)

# Contents

1. Executive Summary .....	4
2. About Us .....	6
3. Background and Purpose .....	9
4. Receiving Parcels .....	12
5. Online Shopping .....	16
6. Sending Parcels .....	23
7. Conclusion .....	27

300



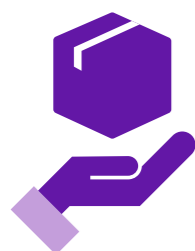
# 1. Executive Summary

The Consumer Council has continued to track the EU Exit related issues that affects the consumer experience when they receive parcels, shop online and send parcels.

This report highlights the key findings from research that was carried out with a representative sample of over 1,000 Northern Ireland consumers in August 2022, November 2022 and February/March 2023, and from four focus groups that took place in January 2023.

The report focusses on three key themes which consist of receiving parcels, online shopping and sending parcels.

The key findings for each theme found:



## When receiving parcels

- Some consumers say they are incorrectly asked to pay customs duties or import fees for parcels coming from Great Britain (GB) (August 2022: 7%, November 2022: 6% and February/March 2023: 7%).
- Some consumers say they are incorrectly asked to pay customs duties or import fees for parcels coming from Republic of Ireland (ROI) (August 2022: 5%, November 2022: 3% and February/March 2023: 3%).
- Some consumers say they are incorrectly asked to pay customs duties or import fees for parcels coming from other European Union (EU) locations (August 2022: 7%, November 2022: 5% and February/March 2023: 3%).



## When buying goods online

- Around four in ten consumers that shop online say they have encountered GB retailers no longer delivering to Northern Ireland which they believe was caused by EU Exit (August 2022: 42%, November 2022: 40% and February/March 2023: 40%).
- On average four in ten say they have noticed an increase in the delivery price charged by the retailer which they believe was caused by EU Exit (August 2022: 42%, November 2022: 40% and February/March 2023: 40%).



## When sending parcels

- On average over one in five consumers that send parcels say they experience customs related issues (August 2022: 19%, November 2022: 18% and February/March 2023: 24%).

It is important that parcels move smoothly to and from Northern Ireland and GB, and the EU and that these issues are addressed for consumers.

It is vital that the future movement of GB to Northern Ireland parcels operate in a way that ensures the issues consumers have experienced in this area which they believe have been caused by EU Exit are addressed.

We will work collaboratively with relevant stakeholders to help deliver better consumer outcomes and will continue to provide insight into the issues faced by consumers post EU Exit when they receive and send parcels from GB and the EU, and shop online.

## 2. About Us

**The Consumer Council was established in April 1985 as a non-departmental public body (NDPB) under the General Consumer Council (Northern Ireland) Order 1984 (The Order). We operate under the Department for the Economy (DfE) on behalf of the Northern Ireland Executive.**

Our vision is to protect and empower consumers in Northern Ireland by ensuring the legislation and regulation for consumer protection works effectively for consumers here.

Our mission is to be the trusted go-to organisation for Northern Ireland consumers, working with governments and stakeholders to inform policy and decision making, using our research, insight and expertise to deliver positive outcomes for consumers.

We have statutory duties in relation to consumer affairs, energy, postal services, transport, water and sewerage, and food accessibility. These include responding to enquiries, investigating complaints, carrying out independent research, educating and empowering consumers, and advising government on matters relating to consumer affairs.

With regards to postal services, the Consumers, Estate Agents and Redress (CEAR) Act 2007 and the Office of Communication's regulatory conditions for Royal Mail, as the universal service provider, provide the Consumer Council with statutory responsibility for representing postal consumers in Northern Ireland.

Our work focuses on carrying out research, influencing policy, providing advice and information, and investigating complaints made by consumers in vulnerable circumstances, and gives us information gathering and investigation powers to help fulfil this statutory function. Our investigation powers also include issues relating to the number and location of post offices across Northern Ireland.

Our non-statutory functions educate and empower consumers against unfair or discriminatory practices in any market including financial services. We are also a designated super-complaints body under the Enterprise Act 2002 and the Financial Services and Markets Act 2013.

### As an insight-led evidence-based organisation, we:

- Provide consumers with expert advice and confidential guidance.
- Engage with government, regulators and consumer bodies to influence public policy.
- Empower consumers with the information and tools to build confidence and knowledge.
- Investigate and resolve consumer complaints under statutory and non-statutory functions.
- Undertake best practice research to identify and quantify emerging risks to consumers.
- Campaign for market reform as an advocate for consumer choice and protection.

We have responsibilities under the Rural Needs Act 2016 and Section 75 of the Northern Ireland Act 1998 to ensure government policies recognise consumer needs in rural areas and promote equality of opportunity and good relations across a range of equality categories.

### We represent and campaign on behalf of all Northern Ireland citizens, in particular those in vulnerable circumstances, and pay particular regard to consumers:

- who are disabled or have long term health conditions
- who are of pensionable age
- who are on low incomes
- who live in rural areas



We use a set of eight guiding principles developed by the United Nations to assess where the consumer interest lies, and develop and communicate our policies, interventions and support. These provide an agreed framework through which we approach regulatory and policy work.

Figure 1: Consumer Principles



The principles ensure we apply a consistent approach across our statutory and non-statutory functions, and in all our engagement with consumers and stakeholders. They serve to protect consumers, setting out the minimum standards expected from markets when delivering products or services in Northern Ireland.

## 3. Background and Purpose

### Background

Our previous research publication discusses the experience and perceptions of consumers when shopping online and using postal services to receive goods from Great Britain (GB) and the European Union (EU), and to send parcels to the EU<sup>1</sup>. This identifies EU Exit related issues with parcel services which affected consumers across Northern Ireland. This included some retailers located in GB and the EU no longer delivering to Northern Ireland, and consumer parcels being mishandled leading to unexpected and incorrectly applied customs charges and operator handling fees when receiving and sending items.

In this context, the Consumer Council continued its work to track the nature and extent of these issues that affect consumers receiving and sending parcels in 2022/23. This report presents the key findings from our research in this area.

### Post & Parcels – The Windsor Framework Agreement

In February 2023 the UK government published the Windsor Framework Agreement<sup>2</sup>. Alongside this, it published a document related to parcel services that explains the agreement will allow for the smooth movement of consumer parcels between Northern Ireland and GB supported by parcel operators working closely with HMRC. The new arrangements will take effect in September 2024, and the UK government explained it will consult and work with business on implementing any changes required<sup>3</sup>.

While our research was largely carried out before the Windsor Framework Agreement, it provides invaluable insight into the consumer experience of parcel services affected by EU Exit.

<sup>1</sup> [The Consumer Council. EU Exit: The consumer online shopping and parcel delivery experience in 2022.](#)

<sup>2</sup> [UK Government Policy Paper. The Windsor Framework. February 2023.](#)

<sup>3</sup> [UK Government Policy Paper. The Windsor Framework - Parcels sector explainer. February 2023.](#)

## Purpose

This report outlines the key findings from independent quantitative research that took place in August 2022, November 2022 and February/March 2023.

A representative sample of over 1,000 consumers took part in each survey<sup>4</sup>. We present the key statistical findings and provide further insight where possible from four focus groups (consisting of six- eight participants) that took place in January 2023 across Northern Ireland<sup>5</sup>.



<sup>4</sup> Social Market Research. Impact of EU Exit on Postal Consumers. May 2023.

<sup>5</sup> Cognisense. Impact of EU Exit on consumers in Northern Ireland that use parcel services. February 2023.

The report focusses on three key themes which consist of receiving parcels, online shopping and sending parcels. It provides insight into:



### Receiving parcels

- The types of parcels consumers receive.
- What locations consumers receive parcels from.
- Which couriers and postal operators are delivering these parcels.
- The issues consumers are experiencing when receiving these parcels.



### Online shopping

- What goods consumers are purchasing online.
- The key issues consumers are experiencing when buying goods online.
- Which type of online retailers are telling consumers they no longer deliver to Northern Ireland and the impact of this on consumers.



### Sending parcels

- The types of parcels consumers send.
- What locations consumers are sending these parcels to.
- Which couriers and postal operators consumers are using to send parcels.
- The issues consumers are experiencing when sending these parcels.

# 4. Receiving Parcels

Consumers receive a wide range of parcels. This includes to receive goods bought online and receiving parcels from friends and family.

Online shopping remains a fundamental part of the Northern Ireland consumer lifestyle with nearly all consumers (August 2022: 94%, November 2022: 97% and February/March 2023: 98%) receiving parcels for goods they have ordered online over the previous 12 months. Indeed, the majority (August 2022: 76%, November 2022: 75% and February/March 2023: 75%) of consumers across Northern Ireland receive these parcels monthly further highlighting the importance of the online shopping market to consumers.

The focus groups provide insight into why consumers in Northern Ireland buy goods online. Overall consumers feel there are many advantages to shopping online over visiting stores. This includes more choice, better prices and convenience.

“There was a hat in the shops I wanted for £25. Found it for £15 online then they sent me an offer so ended up getting it for £10.”

“You could end up tripling the price by the time you go into town and pay fuel and parking.”

The focus groups also show that the risk of contracting COVID-19 is a consideration for some. Another factor consumers highlight is that many websites they regularly buy from do not have outlets in Northern Ireland.

Parcels are important for consumers to receive items from friends and family. This may include presents for special occasions. Our research shows that over the last 12 months the majority of consumers receive parcels from friends and family (August 2022: 71%, November 2022: 70% and February/March 2023: 70%). Typically, one in five (August 2022: 19%, November 2022: 20% and February/March 2023: 20%) consumers across Northern Ireland also receive these parcels monthly.

Most parcels related to online shopping coming from GB. Each survey shows GB is the main location, followed by Northern Ireland, then ROI and other EU locations (Table 1). Additionally, most parcels from friends and family come from GB and Northern Ireland. Table 1 shows over the previous 12 months that consumers typically receive most parcels from GB and Northern Ireland, although that varied in each survey. It is important to highlight that consumers also receive parcels from ROI and other EU locations which again varied in each survey (Table 1).

Table 1. Where most consumer parcels come from

Where does most of your online shopping come from? (Business to Consumer)			
	August 2022 (Base: 972)	November 2022 (Base: 970)	February/March 2023 (Base: 1005)
Great Britain	61%	70%	71%
Northern Ireland	23%	19%	19%
Republic of Ireland	5%	1%	2%
Other European Union locations	2%	2%	2%
Other international locations	1%	1%	0%

Where does most of your parcels from friends and family come from? <sup>6</sup> (Consumer to Consumer)			
	August 2022 (Base: 737)	November 2022 (Base: 707)	February/March 2023 (Base: 730)
Great Britain	39%	42%	47%
Northern Ireland	43%	42%	36%
Republic of Ireland	8%	3%	6%
Other European Union locations	4%	6%	3%
Other international locations	3%	6%	7%

Our research insight underlines the importance of ensuring the smooth movement of parcels to Northern Ireland from GB, ROI and other EU locations.

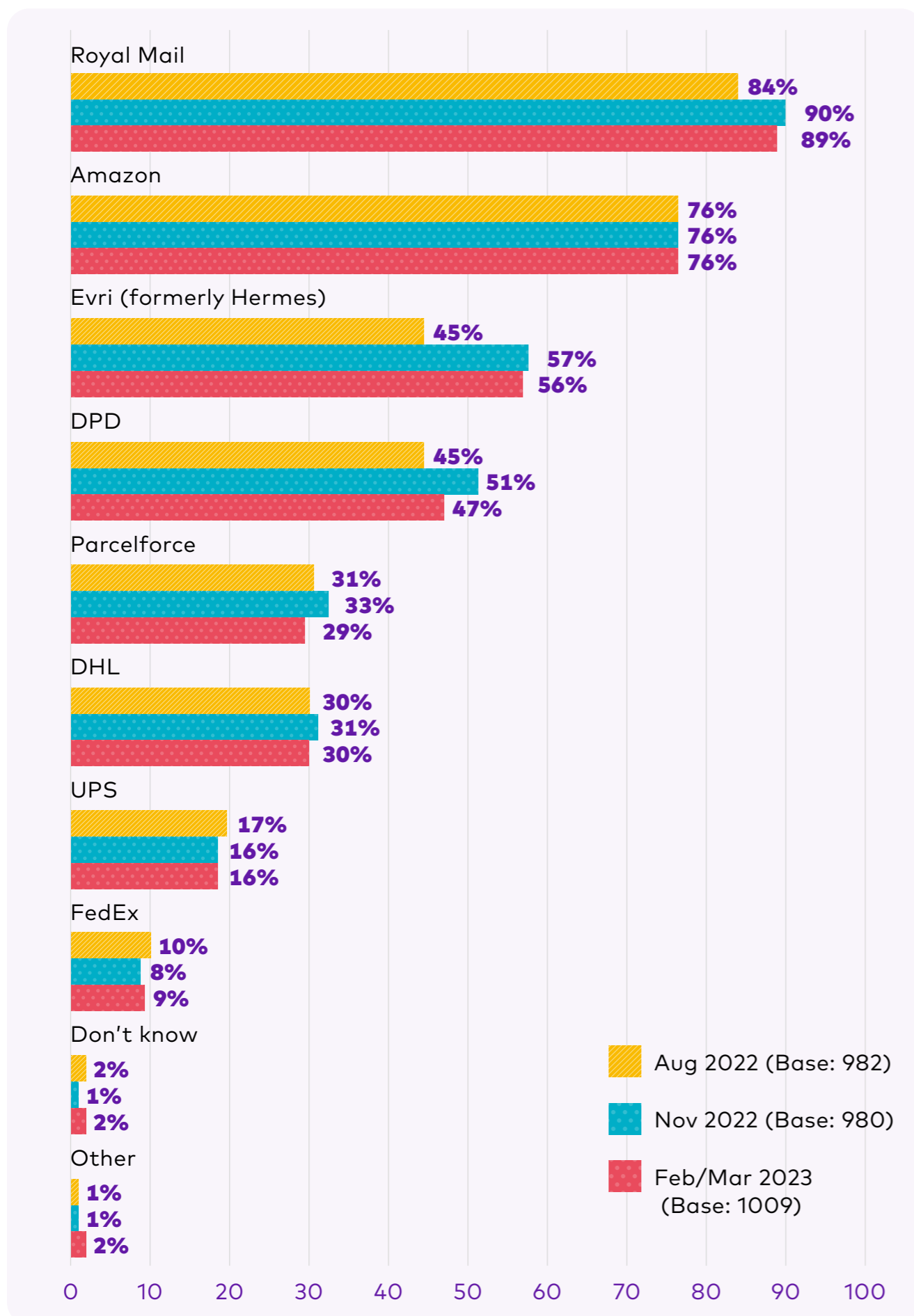
## Parcel and postal operators delivering parcels to consumers across Northern Ireland

Parcel operators have a key role to play to help ensure the smooth movement of parcels. This is recognised by the Windsor Framework Agreement<sup>7</sup>. Our research shows the wide range of parcel operators delivering consumer parcels (Figure 1) and it underlines the fundamental role of Royal Mail and Amazon as well as others. This reinforces the importance of parcel operators working closely with HMRC and that the future movement parcels from GB to Northern Ireland operates in a way that ensures the issues consumers have experienced which they believe have been caused by EU Exit are addressed. These issues are discussed below.

<sup>6</sup> The Consumer Council. Social Market Research. EU Exit: Northern Ireland Consumer Survey (One Year Later). March 2022. Base: 910.

<sup>7</sup> [UK Government Policy Paper. The Windsor Framework - Parcels sector explainer. February 2023.](#)

Figure 1: In the past 12 months, to the best of your knowledge, which couriers or postal operators have delivered your parcels?



### Issues consumers are experiencing when receiving parcels in 2022/23

Our research also points to the issues currently being experienced when consumers receive parcels from GB, ROI and EU locations. These include delays when receiving parcels, although some in the focus groups acknowledge that these may have been caused by postal strikes and COVID-19 related issues.

However, the research does show that some consumers were incorrectly asked to pay customs duties or import fees for parcels coming from GB, ROI and the EU. For instance:

- Some consumers (August 2022: 7%, November 2022: 6% and February/March 2023: 7%) were asked to pay customs duties or import fees for parcels coming from GB,
- Some consumers (August 2022: 5%, November 2022: 3% and February/March 2023: 3%) were asked to pay customs duties or import fees for parcels coming from ROI, and
- Some consumers (August 2022: 7%, November 2022: 5% and February/March 2023: 3%) were asked to pay customs duties or import fees for parcels coming from the EU.

These issues are likely caused by confusion, but these findings identify an area where improvements are required as no fees should be applied. Addressing this will help to ensure the smooth movement of parcels going to Northern Ireland.

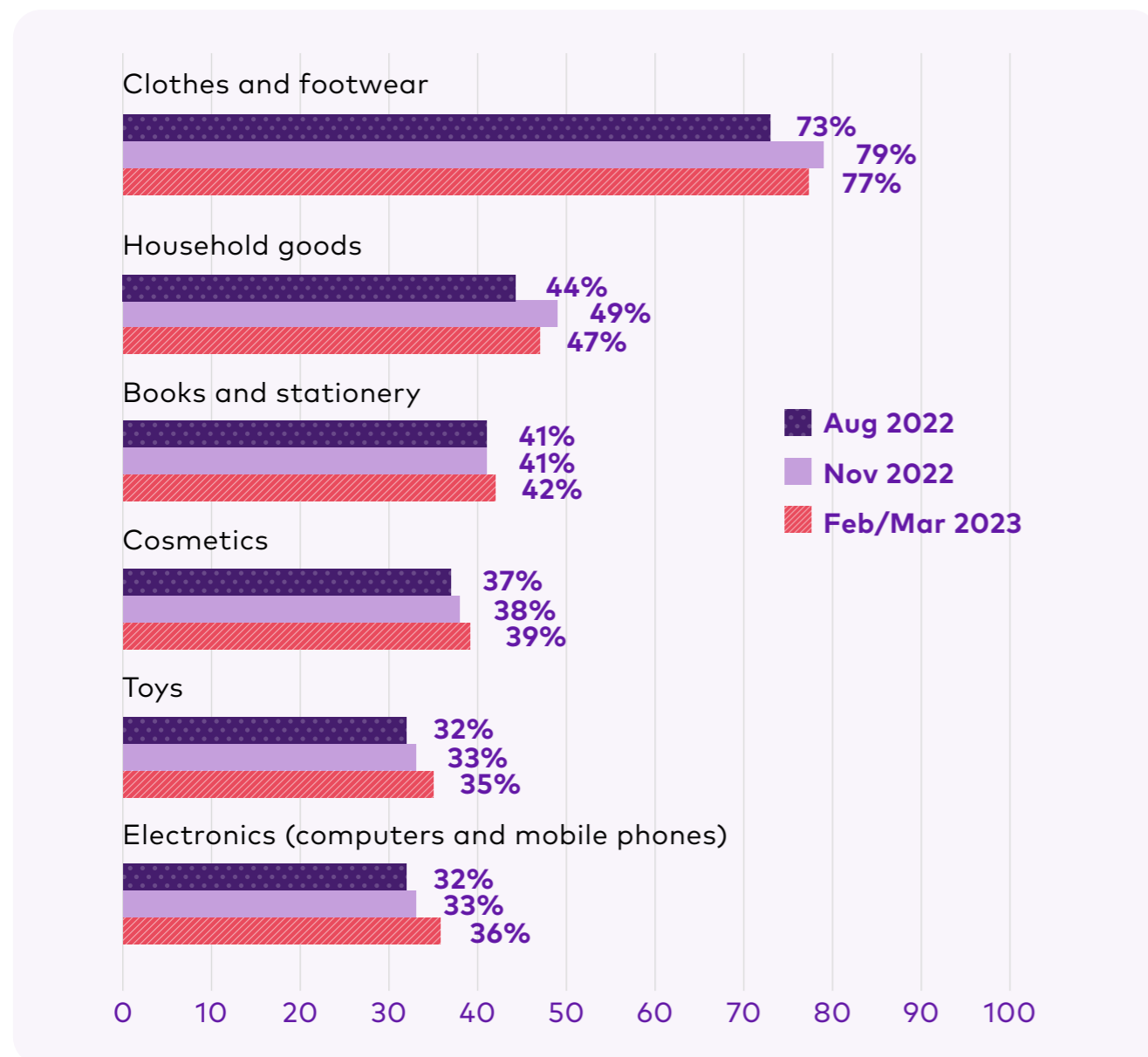




# 5. Online Shopping

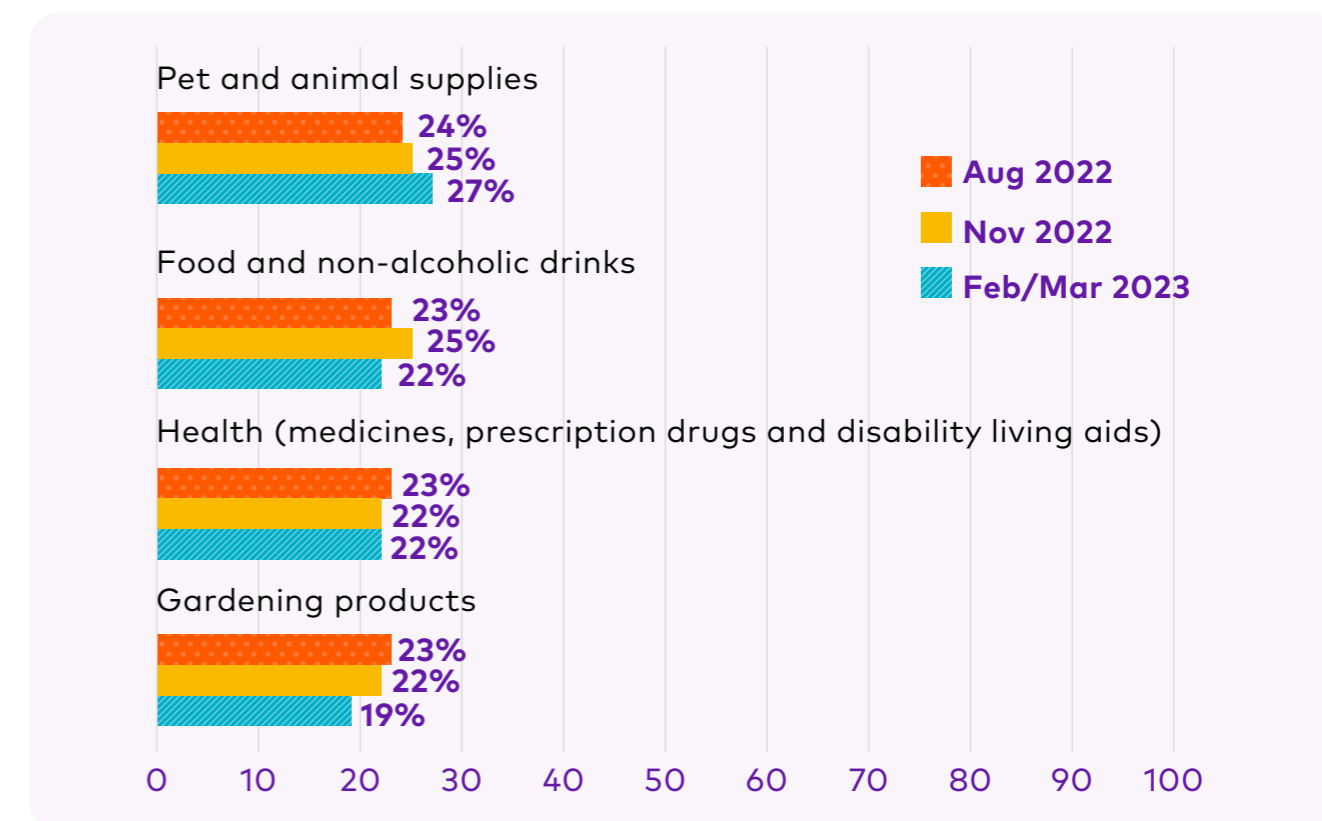
## What consumers are buying online in 2022/23

Our research has established the types of goods consumers have bought online. Over the last 12 months in each survey the top 6 types of goods consistently included<sup>8</sup>:



<sup>8</sup> Question: What types of products have you bought online in the last 12 months? (August 2022 – Base: 908), (November 2022 – Base: 930) and (February/March 2023 – Base: 963).

Additionally, a significant proportion in each survey buy:



## Issues over the last 12 months

Our research identifies what issues Northern Ireland consumers have experienced when shopping online which consumers say can be attributed to EU Exit over the previous 12 months.

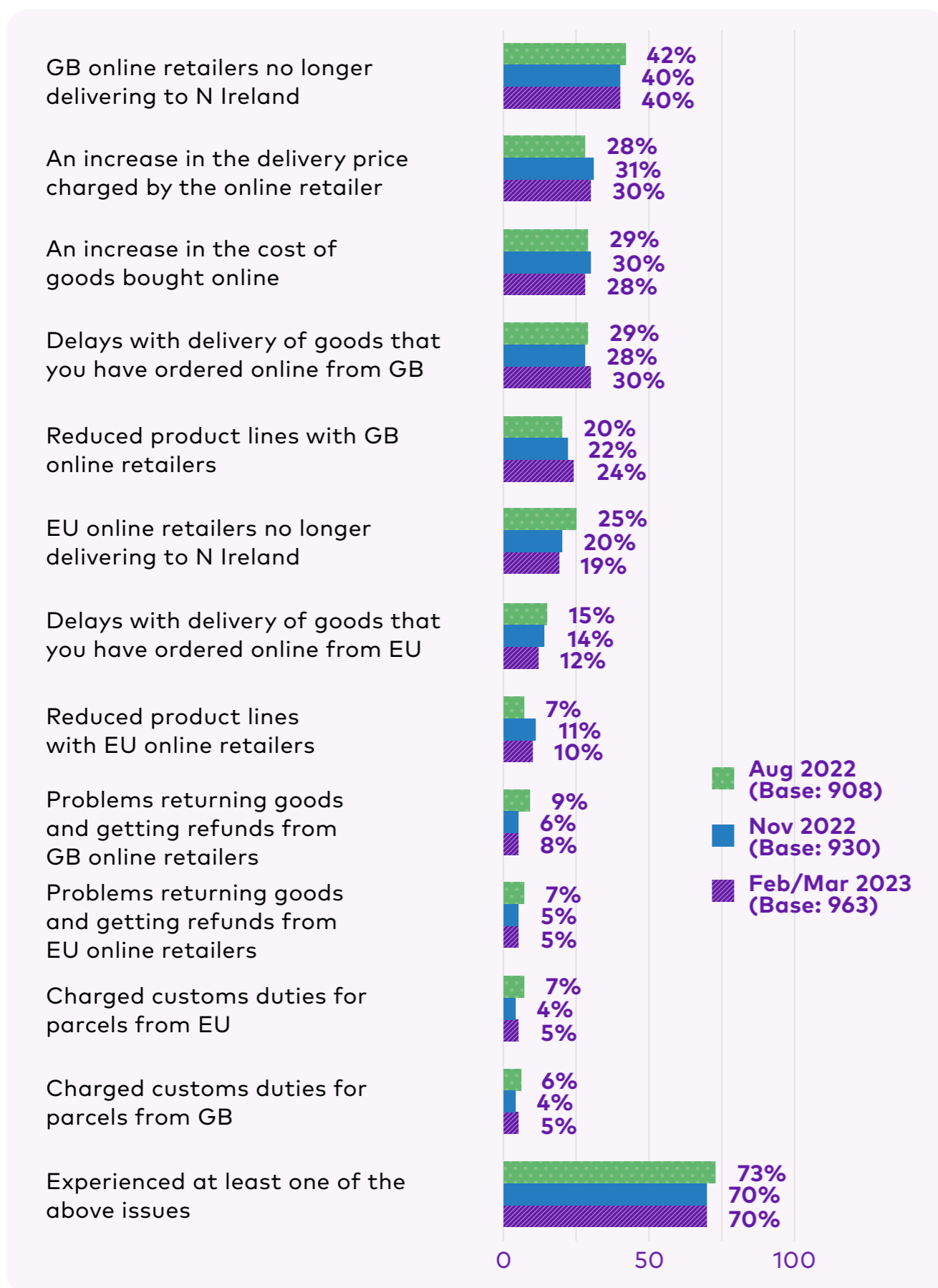
The survey findings show that consumers experience a range of issues when ordering goods online. The top four issues (Figure 2) in each survey are:

- GB online retailers no longer delivering to Northern Ireland
- An increase in the delivery price charged by the online retailer
- An increase in the cost of goods bought online
- Delivery delays for goods coming from GB<sup>9</sup>.

Figure 2 provides more detail on the other issues and we discuss below in more detail those that are GB and EU related.

<sup>9</sup> Some in the focus groups acknowledged that these may have been caused by postal strikes and COVID-19 related issues.

Figure 2: In the last 12 months have you experienced any of the following which you believe have been caused by EU Exit (rather than COVID-19 or rising fuel costs)?



### The key issues related to GB located retailers

While delayed delivery and reduced product lines were identified with GB based retailers, the top issue faced by consumers is some of these retailers no longer deliver to Northern Ireland. Our focus groups provided greater insight into the problems:

“You go through the whole process then you find out they don't deliver to Northern Ireland.”

This insight indicates confusion among some retailers when selling goods to consumers across Northern Ireland. Consumers that took part in the focus groups believe that an increase in paperwork because of 'Brexit' was the reason for GB companies not delivering to Northern Ireland.

However, others were confused as to why not all retailers seem to be affected in the same way and that some GB retailers may be using 'Brexit' as an excuse not to deliver to Northern Ireland.

Table 2. Key issues consumers are experiencing related to GB located online retailers

	August 2022 (Base: 908)	November 2022 (Base: 930)	February/March 2022/2023 (Base: 963)
GB online retailers no longer delivering to NI	42%	40%	40%
Delays with delivery of goods ordered online from GB	29%	28%	30%
Reduced product lines with GB online retailers	20%	22%	24%

Additionally, a significant proportion of consumers (August 2022: 42%, November 2022: 42% and February/March 2023: 44%) who say GB retailers are no longer delivering to Northern Ireland frequently experience this issue.

Our research also explores what type of retailer is no longer delivering to Northern Ireland. Consumers most commonly identify GB marketplace sellers (e.g., eBay, Etsy etc.) as no longer delivering to Northern Ireland and this trend increased from August 2022 to February/March 2023 (Table 3).

These findings suggest that not only parcel operators have a key role to play ensuring the smooth movement of goods, but retailers will need support too, especially those selling goods through online marketplaces. This general point was highlighted by those that took part in the focus groups with respondents saying:

“You can still get from a few companies so why some and not others?”

“Small companies, like the two-man bands are thinking it's not worth the paperwork for all they are making on it.”

Table 3. GB based - What type of online retailer(s) have you experienced no longer delivering to Northern Ireland?

	August 2022 (Base: 450)	November 2022 (Base: 427)	February/March 2023 (Base: 453)
GB based marketplace sellers (i.e. eBay, Etsy, Amazon Marketplace etc)	49%	57%	59%
GB based large retailer (i.e. department stores)	41%	39%	39%
GB specialist independent retailer (i.e. car parts, food)	29%	35%	34%

### The key issues related to EU based retailers

While delayed delivery and reduced product lines were identified with EU based retailers, the top issue consumers are experiencing is EU based retailers not delivering to Northern Ireland (Table 4).

Table 4. Key issues consumers are experiencing related to EU located retailers

	August 2022 (Base: 450)	November 2022 (Base: 427)	February/March 2023 (Base: 453)
EU online retailers no longer delivering to NI	25%	20%	19%
Delays with delivery of goods ordered online from EU	15%	14%	12%
Reduced product lines with EU online retailers	7%	11%	10%

Additionally, a significant proportion of consumers (August 2022: 30%, November 2022: 34% and February/March 2023: 30%) who say EU retailers are no longer delivering to Northern Ireland frequently experience this issue.

Again, our research also explored what type of retailer is no longer delivering to Northern Ireland. It shows EU marketplace sellers (e.g., eBay, Etsy etc.) are where the greater proportion of consumers experience this issue. Similarly, these findings suggest EU based retailers need support too specifically those selling through online marketplaces.

Table 5. EU based - What type of online retailer(s) have you experienced no longer delivering to Northern Ireland?

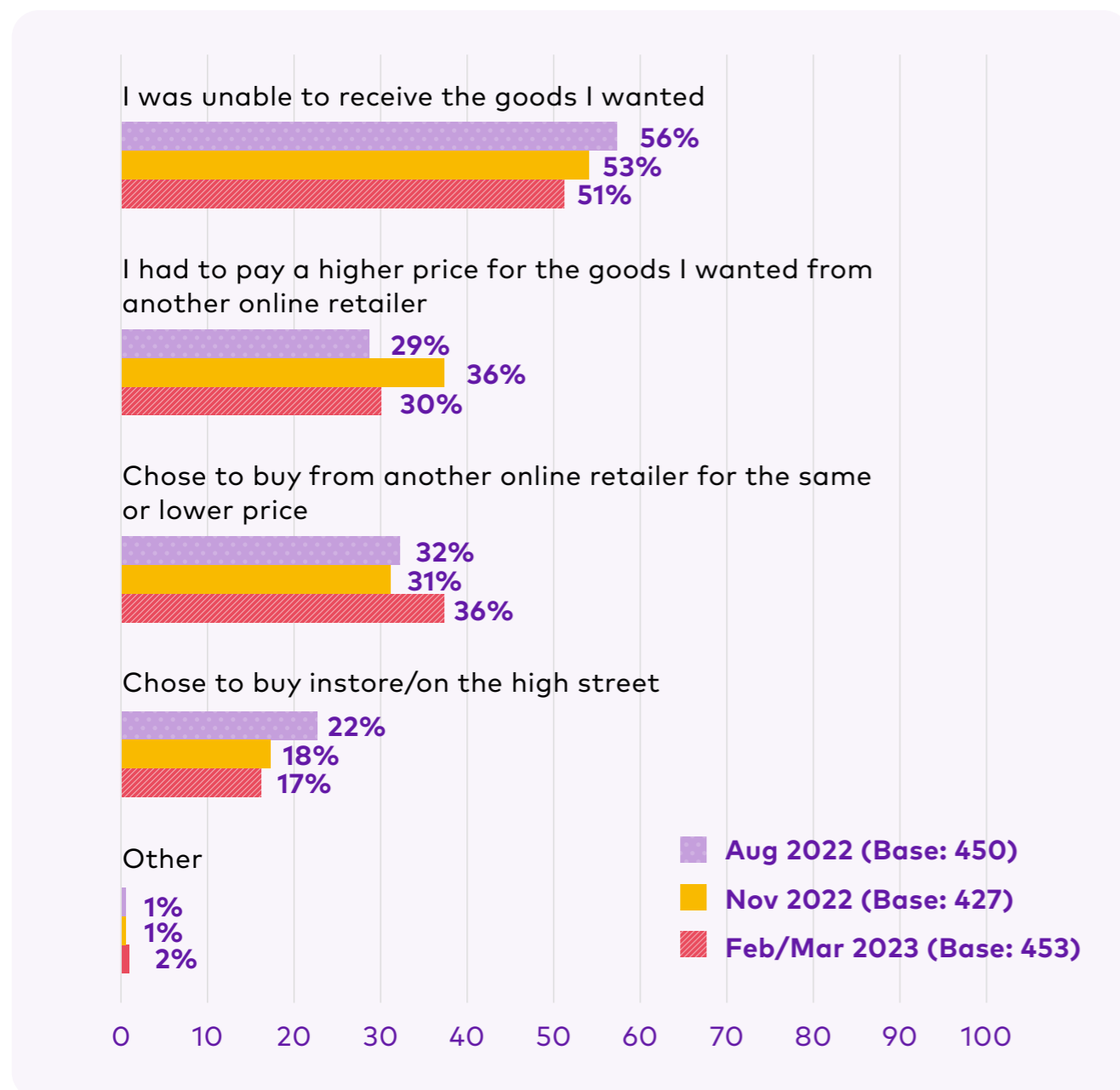
	August 2022 (Base: 450)	November 2022 (Base: 427)	February/March 2023 (Base: 453)
EU based marketplace sellers (i.e. eBay, Etsy, Amazon Marketplace etc)	34%	34%	34%
EU based large retailer (i.e. department stores)	18%	14%	14%
EU specialist independent retailer (i.e. car parts, food)	11%	14%	14%



## The impact of no longer delivering to consumers across Northern Ireland

We also explored how retailers no longer delivering to Northern Ireland is affecting consumers. Regardless of whether buying from GB or EU retailers, of those that have experienced this issue in each survey over half (August 2022: 56%, November 2022: 53% and February/March 2023: 51%) say they were unable to receive the goods they wanted.

Figure 3: What impact did the online retailer (s) no longer delivering to NI have on you?



## 6. Sending Parcels

Parcels play an important role for consumers sending items. This includes for returning goods bought online, sending parcels to friends and family and sending parcels for items consumers sell online.

Our research shows that over the previous 12 months<sup>10</sup>:

- The majority of consumers (August 2022: 73%, November 2022: 66% and February/March 2023: 65%) have sent parcels for online returns,
- The majority of consumers (August 2022: 63%, November 2022: 66% and February/March 2023: 65%) have sent parcels to friends and family,
- Around half of consumers (August 2022: 50%, November 2022: 46% and February/March 2023: 49%) have sent parcels related to second hand items they sell online.



<sup>10</sup>How often, if at all, have you sent the following types of parcels in the past 12 months? (Base: All)

Consumers send these parcels to various locations in GB and the EU. The findings are presented in the table below and underline the importance of ensuring parcels move smoothly when sent from Northern Ireland to GB, ROI and to various other EU locations.

Table 6. Where parcels are mostly sent to

Online returns	August 2022 (Base: 744)	November 2022 (Base: 663)	February/March 2022/2023 (Base: 702)
Great Britain	66%	74%	78%
Northern Ireland	19%	16%	13%
Republic of Ireland	2%	1%	2%
Other European Union locations	5%	3%	2%
Other international locations	1%	1%	1%

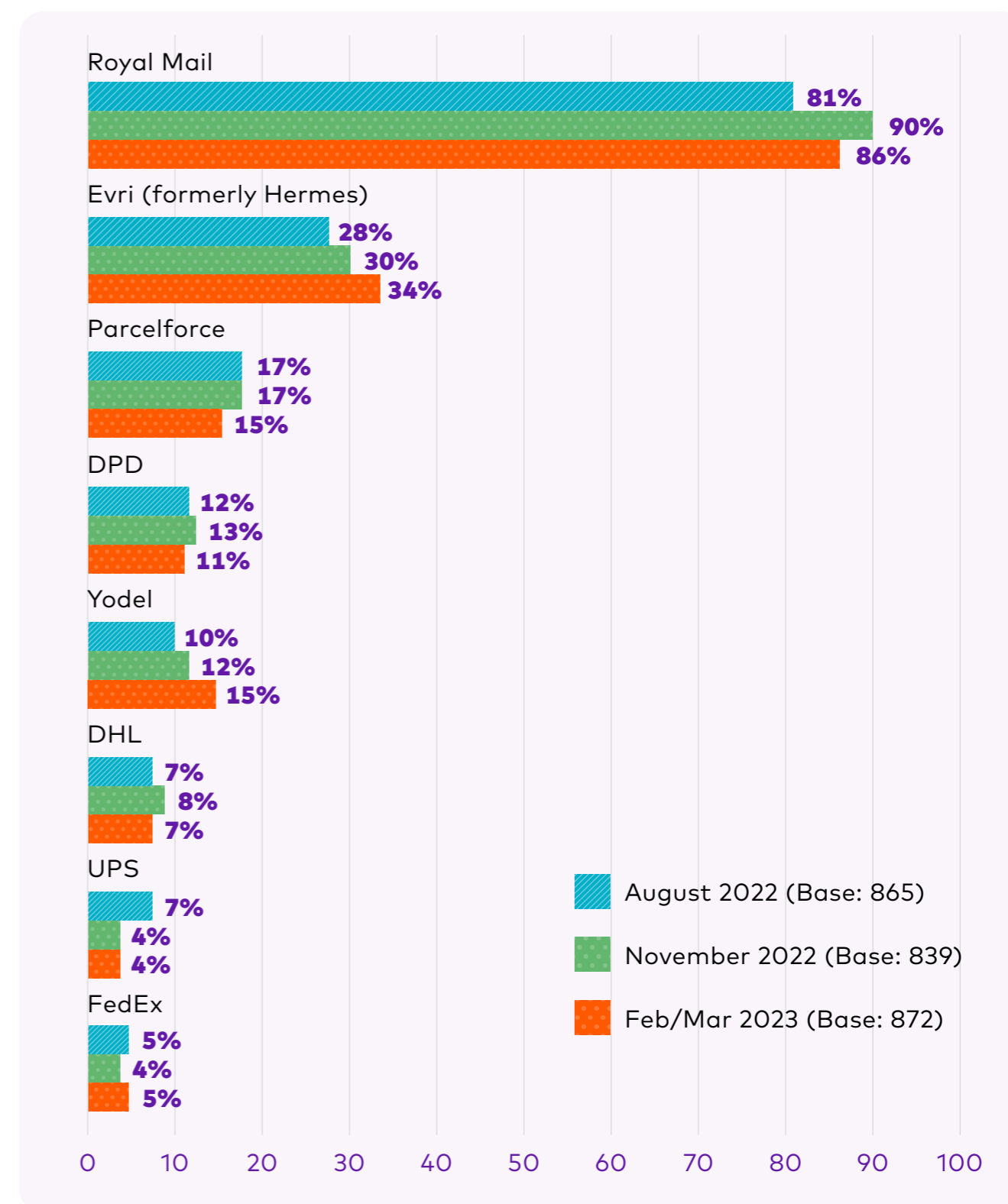
Friends and Family	August 2022 (Base: 642)	November 2022 (Base: 617)	February/March 2023 (Base: 667)
Great Britain	46%	47%	48%
Northern Ireland	34%	39%	36%
Republic of Ireland	8%	4%	4%
Other European Union locations	5%	5%	3%
Other international locations	2%	4%	5%

Second hand items sold online	August 2022 (Base: 508)	November 2022 (Base: 460)	February/March 2023 (Base: 531)
Great Britain	58%	65%	68%
Northern Ireland	28%	27%	22%
Republic of Ireland	4%	2%	3%
Other European Union locations	2%	1%	3%
Other international locations	2%	0%	1%

### Parcel and postal operators consumers use to send parcels

Our research highlights the important role that parcel operators especially Royal Mail play (Figure 4). In each survey Royal Mail was the most used operator by consumers.

Figure 4: In the past 12 months which couriers or postal operators did you use to send parcels?



## The key issues

Our research establishes the customs related issues consumers experienced when sending parcels. The findings show a significant minority experienced these issues and there are suggestions of an increasing trend (August 2022: 19%, November 2022: 18% and February/March 2023: 24%) from August 2022 to March 2023.

To explore this further we reviewed a range of parcel operator's online platforms to better understand what may be contributing to these problems. This exercise shows that Royal Mail, EVRI, DPD and Parcelforce requests customs data from consumers in Northern Ireland when they send parcels to EU destinations<sup>11</sup>.

The focus group elaborated on some these issues as those consumers that took part explained that parcel mishandling such as friends and family being incorrectly charged customs related fees would put them off sending items in future.

|| You shouldn't have to – [NI and ROI] are so close and tightly linked. [With the] EU you'd like to think, because of close ties for many years, they would be more amenable.

These findings identify an area where improvement is required to help ensure parcels sent from Northern Ireland are not mishandled.



<sup>11</sup> Website checks July 2023.

# Conclusion

**Our research provides insight into Northern Ireland consumers' experience when they receive and send parcels from GB and the EU. The findings identify the importance of parcel services to consumers, enabling online shopping transactions, parcel movements between friends and family, and supporting consumers when selling goods privately online. This underlines why parcels need to move smoothly to and from Northern Ireland and GB, and the EU, and the vital role of a wide range of parcel operators.**

The findings identify the nature and extent of the issues consumers experience such as challenges for Northern Ireland consumers when ordering goods online from GB and EU retailers, receiving parcels from GB and the EU, and when sending parcels to the EU. For instance:

- Some consumers were incorrectly asked to pay customs duties or import fees for parcels coming from GB, ROI and the EU.
- The top issue faced by consumers when buying goods online from GB is some of these retailers no longer deliver to Northern Ireland.
- The top issue faced by consumers when buying goods online from EU is some no longer deliver to Northern Ireland.
- In both GB and EU, marketplace sellers (e.g., eBay and Etsy) are where the greater proportion of consumers experience the no longer delivering issue.
- A significant minority of consumers are experiencing customs related issues when sending parcels and one contributing factor is likely that consumers are being asked to complete customs online forms when sending parcels to EU destinations.

Addressing these issues will help to ensure the smooth movement of parcels going to and from Northern Ireland.

Also, the future movement of parcels from GB to Northern Ireland must operate in a way that ensures the issues consumers have experienced which they believe have been caused by EU Exit are fully addressed.

The Consumer Council will work collaboratively with relevant stakeholders and continue to provide insight into these issues faced by Northern Ireland consumers.



Floor 3, Seatem House, 28-32 Alfred Street,  
Belfast, BT2 8EN

Text / phone: 028 9025 1600

Email: [info@consumercouncil.org.uk](mailto:info@consumercouncil.org.uk)

Web: [www.consumercouncil.org.uk](http://www.consumercouncil.org.uk)